

**Seattle Human Services Department (HSD)
Aging and Disability Services (ADS)
Mayor's Council on African American Elders (MCAAE)**

Request for Proposals

**African American Elder Services
Development Consultant**

Proposals Due Date:

Monday, November 4, 2002, 5:00 p.m.

Submit Proposal to:

Aging and Disability Services
ATTN: Karen M. Winston
Planning & Development Specialist
618 – 2nd Avenue, Suite 1020
Seattle, WA. 98104-2232

Timeline

| | |
|------------------------------|--------------------------------------|
| Request for Proposal Issued: | Monday, October 14, 2002 |
| Proposer's Workshop: | Tuesday, October 22, 2002, 1:00 p.m. |
| Proposals Due: | Monday, November 4, 2002 |
| Award Announcement: | November 25, 2002 |
| Contract Start Date: | January 1, 2003 |
| Contract End Date: | December 31, 2004 |

Aging and Disability Services
African American Elder Services
Development Consultant
Request for Proposals

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Aging and Disability Services
African American Elder Services
Development Consultant
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I. Purpose

The Seattle- King County Aging and Disability Services (**ADS**) and the Mayor's Council on African American Elders (**MCAAE**) are working together to strengthen the African American Elders Project (**AAEP**) and ultimately transfer sponsorship to a new not-for-profit agency - African American Elder Services (**AAES**). The AAES is a start-up non-profit agency, created with guidance from MCAAE, with an independent board under development. (See Organizational Chart Attachment #1)

The total amount available for the Development Consultant is **\$53,320** for calendar year 2003. This will be a one year contract to develop the new nonprofit agency to the point where full sponsorship of AAES is implemented.

Background

African American Elder Services is a start-up not-for-profit agency. The agency vision is **to develop a comprehensive continuum of services that will improve the quality of life while strengthening the community's capacity to support the basic needs of their elders**. The two-year goal is to establish AAES as an independent agency providing services to older African Americans. This is an expansion of the original effort that led to the development of the African American Elders Project. The AAEP will be a program component under the umbrella of the AAES.

The AAEP seeks to identify frail and isolated African American Elders 60 years or older, and assist them in accessing and receiving social and health services through case management, support and referrals. AAEP partners include the Mayor's Council on African American Elders, Aging and Disability Services (a division of the Seattle Human Services Department), Public Health: Seattle & King County, and Senior Services of Seattle/King County, a nonprofit organization. (See AAEP Fact Sheet Attachment #2)

In addition to sponsorship of the AAEP, and working with the project partners, African American Elder Services will:

- Serve as a community-based service provider addressing issues related to the well-being of older African Americans.
- Plan and implement fund development activities which will include an annual community fundraiser.
- Build a volunteer support system to increase community involvement in providing support to older African Americans.

More About ADS and the MCAAE

The Seattle-King County Aging and Disability Services (**ADS**) is the designated Area Agency on Aging for the Seattle-King County region. ADS is administered by the City of Seattle's Human Services Department. The City, together with King County and United Way of King County, serve as the sponsors and policy setting board of the agency. It is the mission of ADS to develop a community that promotes quality of life, independence and choice for older people and adults with disabilities in King County.

ADS provides staff support for the Mayor's Council on African American Elders (**MCAAE**). The MCAAE is a mayoral appointed advisory board created in 1995 by past Mayor Norm Rice. The MCAAE advises the Mayor and City Council regarding policies, programs, and services that are designed to respond to the needs and challenges confronting older African Americans. The MCAAE also currently oversees the AAEP which offers a comprehensive social and health services program that works to improve the quality of life for older African Americans, while strengthening the community's capacity to support their elders basic needs. Sponsorship of the AAEP will transition to the AAES organization upon completion of the AAES Board development.

Development Milestones

ADS and the MCAAE are seeking a Development Consultant to achieve the following target and milestones during 2003. Reimbursements will be paid upon the completion of each milestone.

Target: A non-profit agency that raises and allocates funds for programs that will benefit older African Americans will be operating by December 31, 2003.

Milestone 1

A 12 member Board of Directors has been established, representing a wide range of skills and interests, and will be attending monthly meetings.

Milestone 2

The Board of Directors has adopted by-laws.

Milestone 3

The Board of Directors has adopted a 2003 2004 strategic/business plan with a vision, mission and priorities, and targets for a volunteer component.

Milestone 4

The Board of Directors has developed proposed agency staff position(s), job description(s) and a timeline for recruitment.

Milestone 5

The Board of Directors has developed financial systems and accountability, a budget for revenue and annual expenditures, and is reading and understanding monthly financial reports.

Milestone 6

The Board of Directors has adopted and achieved specific fund-raising targets and approaches in 2003.

Milestone 7

Several public relations pieces exist and have been implemented and distributed. Specifically, a brochure describing 2003 services has been distributed widely in the community.

Milestone 8

A Federal EIN #, all required state and local business licenses, and Federal non-profit status have been obtained.

II. Who Is Eligible to Apply?

Proposals meeting the requirements of this RFP will be accepted from any legally constituted agency which meets the following minimum qualifications:

1. Is incorporated as a duly certified private non-profit corporation in the state of Washington and has been granted 501(c)(3) tax exempt status.
2. Is a public corporation, commission, or authority established pursuant to RCW 35.21.660 or RCW 35.21.7301.
3. Is an incorporated, for-profit organization.
4. The proposer has a demonstrated capacity to ensure adequate administrative and accounting procedures and controls necessary to safeguard all funds which may be awarded under the terms of this RFP. Entities without such capabilities may wish to have an established agency act as fiscal agent.
5. The proposer can demonstrate a capability to meet program expenses in advance of reimbursement.

III. Guidelines, Policies and Requirements

1. Proposals should follow the format specified in this RFP and use the budget pages which are provided. Proposers must respond to every question in the RFP. Proposals will be screened for compliance with the guidelines provided in this RFP and will then be read and rated solely on the content of the proposal and on the performance reports for any similar programs that the proposer has provided in the past. Proposals which do

not address each question in this RFP may be deemed unresponsive and will not be considered for a possible contract as a result of this RFP.

2. Should revisions be made to the RFP, addenda will be provided to all proposers receiving the RFP. If any proposer believes that ADS failed to provide addenda to them, it is the responsibility of the proposer to contact ADS to receive addenda.
3. ADS reserves the right to reject any or all proposals received.
4. In the event that only a single responsive proposal is received, ADS reserves the right to reject the proposal or negotiate an agreement for services with the single proposer.
5. Persons or agencies whose proposals have not been selected for further negotiation or award will be notified in writing at the address given on the proposal after the award is made.
6. Any contract resulting from this RFP will be required to comply with the Terms and Conditions of the Human Services Department Consultant Services Agreement (CSA). These requirements shall be included in any contract awarded as a result of the RFP and are not negotiable. (See Attachment #3). Copies of the CSA will also be available at the Proposers Conference and upon request.
7. Any contract resulting from this RFP will be between the City of Seattle, Human Services Department, and the proposer. Any work, which the proposer intends to subcontract to other entities, must be detailed in the proposal.
8. Contractors will be required to maintain books, records, documents, and other evidence directly related to performance of the work in accordance with Generally Acceptable Accounting Procedures. The City of Seattle, or any of its duly authorized representatives, shall have access to such books, records and documents for inspection, audit and copying for a period of seven years after completion of work.
9. Contractors must complete all required reports and billing documentation in a timely manner. Reimbursement will be contingent upon receipt and approval of required reports. Additional data may be required for audit or evaluation purposes.
10. The funding from this RFP may be used to increase existing capacity or used to build capacity within the community that does not currently exist. The funding from this RFP may not be used to supplant existing resources devoted to older African Americans.
11. All programs funded through ADS must publicly recognize the ADS/HSD contribution to the program.
12. The decision of ADS may be appealed by any agency submitting a proposal. (See Proposer Appeals Process, pg. 11)
13. For purposes of this RFP, "older African American" means any African American age 60 years or older.

IV. Proposal Process

Schedule of Activities

| | |
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Proposers Conference and Technical Assistance Workshop

All proposers who intend to submit a proposal are strongly encouraged to attend the Proposers Conference and Technical Assistance Workshop. This session is scheduled for **Tuesday, October 22, 2002, 1:00 p.m., 13th floor Conference Room.**

Questions arising at the October 22nd session, or in prior communication with the RFP Coordinator which require further investigation, will be documented and answered in written form. If the questions result in changes to the RFP, an amendment will be published and sent to each proposer who expressed intent to submit a proposal.

Proposal Submittal

Proposals may be prepared using word processing, but must follow the format specified in this RFP and use the forms which are provided. Proposers are to submit the original proposal, plus six (6) additional copies to:

Aging and Disability Services
ATTN: Karen M. Winston
618 – 2nd Avenue, Suite 1020
Seattle, WA 98104

Proposals may be mailed or delivered in person, but must be received at the above address no later than 5:00 p.m., Monday, November 4, 2002. Emailed and faxed copies will **NOT** be accepted.

All proposals submitted to ADS become public information and may be reviewed by anyone requesting to do so at the end of the selection process. Proposals will become the property of ADS and will not be returned to the proposers.

V. Format and Instructions for Applications

All proposals must be on 8½" x 11" inch paper, one sided, typed or word processed, and single or double spaced. Font size must be at least 11 point. Pages must be numbered. Do not use binders. All proposals must include the signed cover letter and all the required sections.

The following items must be included in the proposal:

Section A: Proposal Cover Page

The Proposal Cover Page must be signed and dated by the President/Executive Director or someone who has the full authority to legally bind the entity submitting the proposal to the contents of the proposal.

Section B: Agency Capacity/Management Experience

- Describe your organization, the mission, the type of service provided, and the length of time in business. Specify your experience in working with the African American community, and its older members.
- Describe your experience with start-up board, agency, and fund development.
- Describe your experience with community outreach activities, and developing public relations materials. (Samples of your work are welcome)
- Describe the management structure for this proposal that clearly identifies relationships of all paid staff and volunteers who will carry out the proposal. Attach an organizational chart if your proposal utilizes a partnership or coalition approach – describe the lead agency responsibilities, their experience, and the relationship of each partner/coalition member for the project. A "Commitment Agreement" form is included as (Attachment #4). This agreement form should be used to identify the responsibilities of any collaborating agency included in your proposal.

Section C: Project Description

This section should not exceed **six** (6) pages, excluding attachments. Responses will be rated according to how well they meet the desired **qualifications** and **project description**.

- The project description will include your proposed approach for accomplishing the development components and deliverables as described on page 5.
- Provide an overall work plan of activities and timeline. Please include dates for quarterly progress reports to be submitted to ADS.
- Describe what you will do to build on and maintain the AAEP partnerships (as described on page 3), and existing providers that are currently serving older African Americans.

Section D: Budget

Please address the questions outline below in the proposed budget for your proposal. The allocation from ADS is expected to be \$53,320 for 2003. There may be additional funding available to achieve specific goals. The budget should include any matches and/or in-kind support, including volunteer services.

1. Describe your fiscal management system. Attach a copy of the management letter by a recognized Public Accounting firm, indicating date and status of your last audit or provide other documentation of a fiscal or program evaluation completed by an independent firm or governmental agency within the past two years.
2. Complete the Personal Detail for all personnel who are involved in operating the project. List the position by title, hourly rate, the number of hours committed to the project, and the dollar amount for salaries by fund source.
3. Proposers shall create a timeline for all costs that will be charged by the proposer for attaining each of the eight development milestones. In addition, proposers should prepare an overall budget using the following categories:
 - Personnel: Include expenses for salaries, wages, and related employee benefits provided for persons contributing to the program for administrative, management and program operations purposes and who are employed by the agency.
 - Contractual: Include services performed for the agency or participants by another entity under a subcontract for items such as auditing, accounting, legal, consultation, instruction, or other services.
 - Operating: Include expenses for telephone, postage, supplies, space or equipment rental and maintenance, mileage, advertising, printing, and duplication, insurance, and utility, rentals, education expenses, etc.
 - Administrative Overhead/Indirect: Administrative overhead costs are costs incurred by the proposer agency's central administration which are chargeable to various programs including the proposed program. Costs included in the indirect costs should not be included as a direct expense.
 - In-kind Match: Use a separate column for the in-kind match, and a separate column for the contributions made by other funding sources.

VI. Relative Scoring Values

The successful bidder will demonstrate how he/she will create a non-profit agency that raises and allocates funds for programs that will benefit older African Americans and will be operating by December 31, 2003. A timeline for all costs should be included that will be charged by the proposer for attaining each of the eight development milestones. Weighting will be given the following considerations in evaluating the proposals.

Milestone 1 – 10%

The proposer clearly demonstrates how he/she will establish a 12 member Board of Directors representing a wide range of skills and interests, and attending monthly meetings.

Milestone 2 – 10%

The proposer clearly demonstrates how he/she will work with the Board of Directors to develop and adopt by-laws.

Milestone 3 – 20%

The proposer clearly demonstrates how he/she will facilitate the development and adoption of a 2003-2004 strategic/business plan with a vision, mission and priorities, and targets for a volunteer component.

Milestone 4 – 10%

The proposer clearly demonstrates how he/she will facilitate the development of proposed agency staff position(s), job description(s) and a timeline for recruitment.

Milestone 5 – 20%

The proposer clearly demonstrates how he/she will facilitate board training to develop financial systems and accountability, a budget for revenue and annual expenditures, and board training for reading and understanding monthly financial reports.

Milestone 6 – 10%

The proposer clearly demonstrates how he/she will facilitate the development, adoption and achievement of specific fund-raising targets and approaches in 2003.

Milestone 7 – 10%

The proposer clearly demonstrates how he/she will develop several public relations pieces specifically including a brochure describing 2003 services that will be distributed widely in the community.

Milestone 8 – 10%

The proposer clearly demonstrates that he/she is knowledgeable about the Federal non-profit application process, and presents a sound plan for obtaining non-profit status.

VII. Composition of Selection Committee

ADS has invited the following representatives to serve on the Selection Committee:

- MCAAE Members (3)
- AAES Board (1)
- ADS Staff (1)

VIII. Appeal Process

Written appeals of decisions may be made to Pamela Piering, Director, Aging and Disability Services, 618 Second Avenue, Suite 1020, Seattle, WA 98104-2232, within ten (10) calendar days from the date of the written notification.

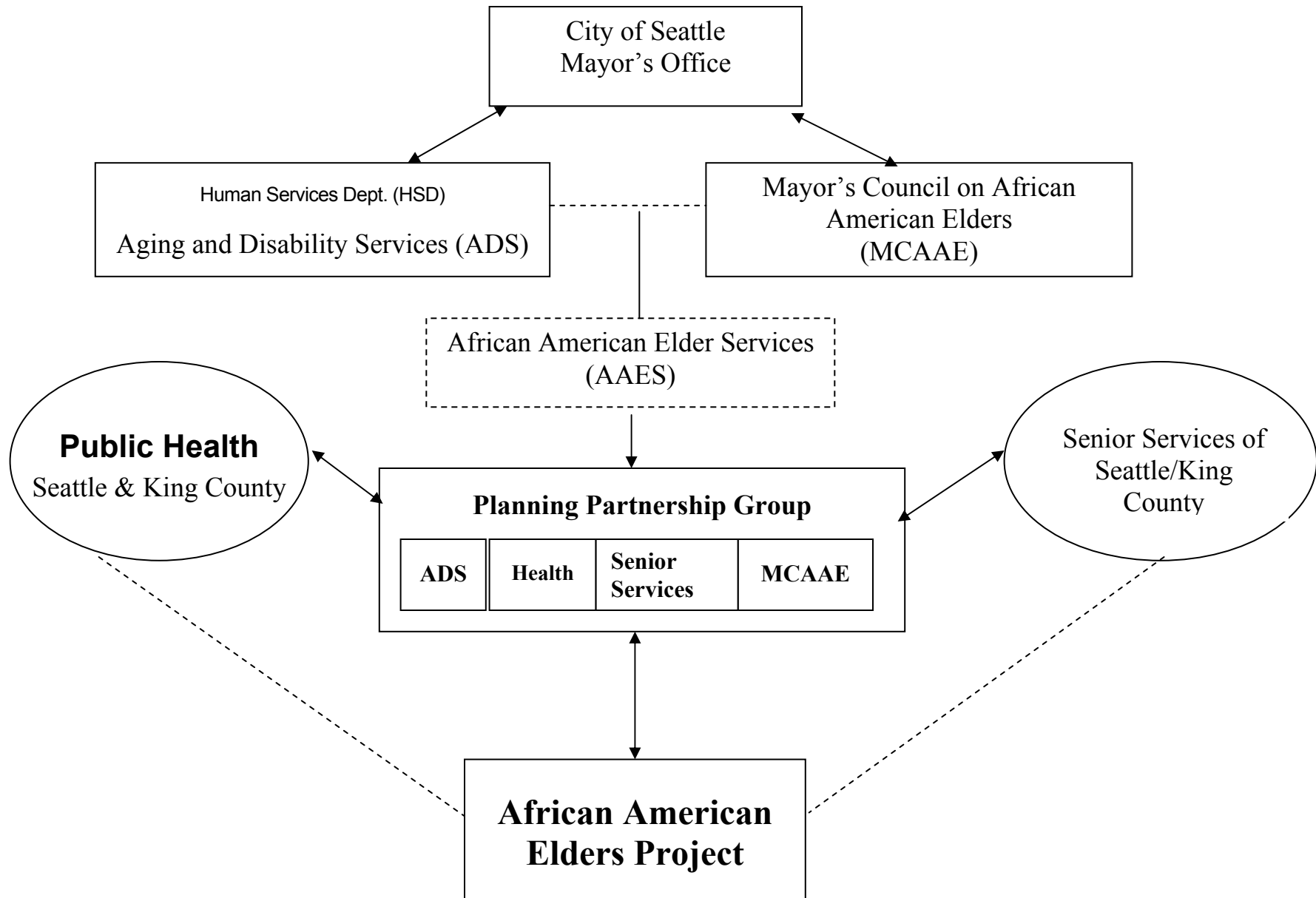
An appeal must clearly state a rationale based on one or more of the following criteria:

- Violation of policy and guidelines included in this RFP.
- Failure to adhere to publicized criteria and/or procedures in carrying out the RFP process.

Upon receipt of a formal written appeal, ADS may request additional information and will provide a written response to the appellant organization within fifteen (15) calendar days.

ATTACHMENTS

African American Elders Services





The African American Elders Project (AAEP) began in 1997. The goal of the project is to identify frail, isolated and hard to serve African Americans and assist them in accessing and receiving needed social and health services through ongoing case management, support and referrals. The project is a partnership between the Mayor's Council on African American Elders, Aging and Disability Services (a division of the City's Human Services Department), Public Health: Seattle-King County, and Senior Services.

Each partner provides a unique contribution to the AAEP:

- ⇒ **Mayor's Council on African American Elders** – *monitors* project development and acts as advisors to the Mayor and other City officials. A *Community Support Specialist* conducts public relation activities and recruits and trains volunteers for the project.
- ⇒ **Aging and Disability Services** – provides direct case management for the project. Three *Case Managers* are primarily responsible for conducting assessments and coordinating care plans.
- ⇒ **Public Health: Seattle & King County** – provides nursing services to the project. A *Public Health Nurse* conducts health screenings and assessments, physician contact, and health education services.
- ⇒ **Senior Services of Seattle/King County** – provides outreach services and community support services for the project. An *Outreach Specialist* is responsible for identifying isolated older persons, informing them about available resources, and encouraging and facilitating their participation.

The project seeks to identify African Americans elders 60 years of age or older who meet at least one of the following criteria:

- ⇒ 60 years and older
- ⇒ Chronically ill, frail, or disabled.
- ⇒ Not able to obtain services or perform activities of daily living.
- ⇒ Low-income or below poverty level.
- ⇒ At risk of premature institutionalization.
- ⇒ In need of multiple services in order to remain in their home.
- ⇒ Lacking formal and informal support systems.

Client characteristics during 2001 were:

- ⇒ 76% - Female; 24% - Male
- ⇒ 61% - 75 years of age and older
- ⇒ 51% - Live in Southeast Seattle
- ⇒ 49% - Live in Central Seattle
- ⇒ 60% - Have monthly incomes less than \$839

Most common client diagnosis and health status in 2001 were:

- ⇒ 24% - Heart Disease
- ⇒ 20% - Arthritis
- ⇒ 19% - Diabetes
- ⇒ 13% - Cancer
- ⇒ 11% - Alzheimer's Disease or dementia

How To Get Help

- **To refer** a person to the African American Elders Project, call (206) 674-9271
- **To volunteer**, call (206) 448-5740
- **For information** about the Mayor's Council on African American Elders, call (206) 684-0706